

# 2 0 2 5 Drop-Off Tax Checklist

## tdOt Tax

Use this quick checklist if you are dropping off your documents. Please include only what applies to you.

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### Client Information (Required)

- Full Name
  - SIN
  - Date of Birth
  - Current Address
  - Phone Number
  - Email Address
  - Marital Status (and spouse's name/SIN if applicable)
  - Void Cheque / Direct Deposit Info (if new or changed)
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### Income Slips

- T 4 – Employment
  - T 4 A – Other Income / Contract
  - T 5 / T 3 – Investment Income
  - T 4 E – Employment Insurance
  - T 4 A(P) – CPP
  - T 4 A(OAS) – OAS
  - T 4 RSP / T 4 RIF – RRSP/RRIF Withdrawals
  - Other slips (please include)
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### Additional Income

- Self-Employment Summary (income & expenses)
  - Rental Income Summary
  - Tips/Gratuities Not on Slips
  - Capital Gains / Investment Sales
  - Cryptocurrency Activity
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## Deductions & Credits

- RRSP Contribution Receipts
  - Tuition (T 2 2 0 2 )
  - Student Loan Interest
  - Medical Expenses (total or receipts)
  - Charitable Donations
  - Childcare Expenses
  - Union / Professional Dues
  - Moving Expenses
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## Home & Property (if applicable)

- Purchase or Sale Documents
  - Property Tax Statement
  - Rental Property Expenses
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## Dependants (if applicable)

Provide name, SIN, and date of birth. -  Child / Dependant Information Included

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## Life Changes During 2 0 2 5

Check any that apply: -  Married / Separated -  Moved -  Bought or Sold Home -  Business -  Retired

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## Authorization

I confirm that the information provided is complete to the best of my knowledge and authorize to prepare my 2 0 2 5 income tax return.

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

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**Questions?** Leave a note below and we will follow up if clarification is needed:

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